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# Cambodia, Laos, Myanmar and Vietnam



ASEAN: Where is the final frontier?

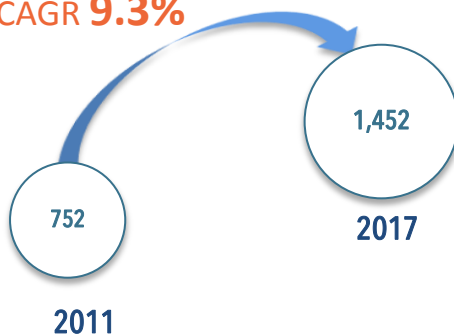
Eastin Grand Hotel, Sathorn, Bangkok – Thursday 8<sup>th</sup> August 2013

## Lucrative Growth Potential Across the Region



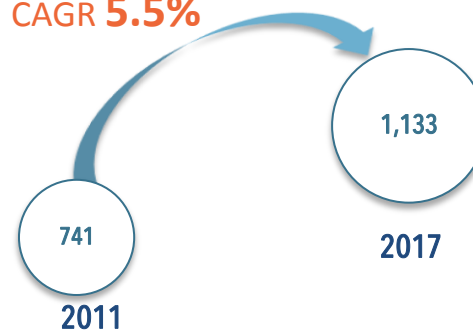
GDP per Capita  
CAGR **9.3%**

Increase of  
Volume Goods  
Import **9.1%**



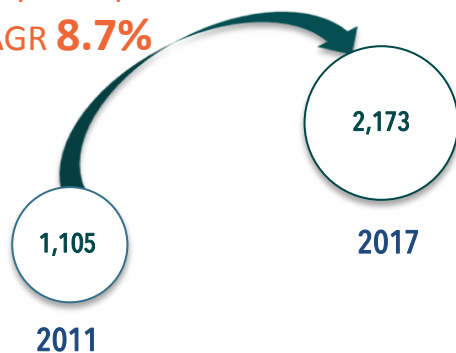
GDP per Capita  
CAGR **5.5%**

Increase of  
Volume Goods  
Import **18%**



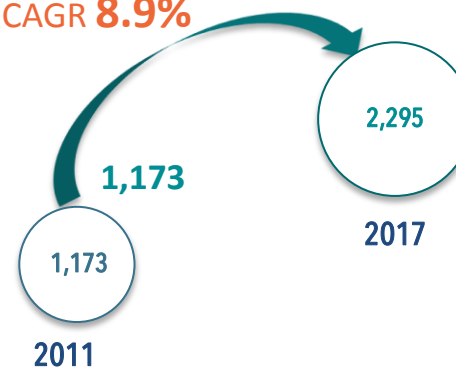
GDP per Capita  
CAGR **8.7%**

Increase of  
Volume Goods  
Import **9%**

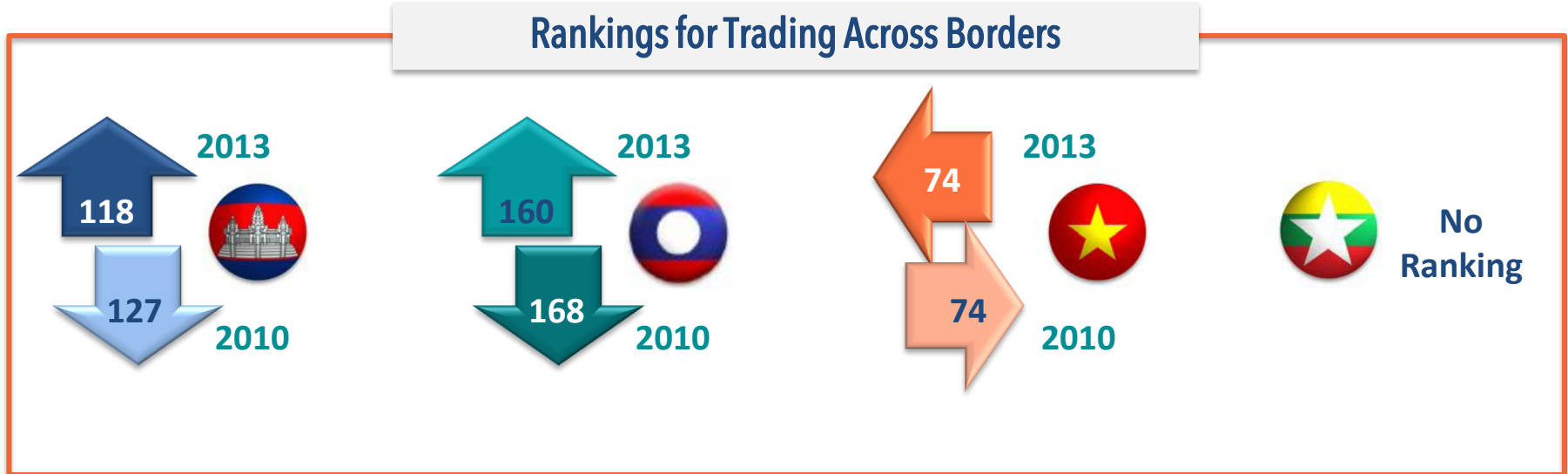


GDP per Capita  
CAGR **8.9%**

Increase of  
Volume Goods  
Import **7.4%**

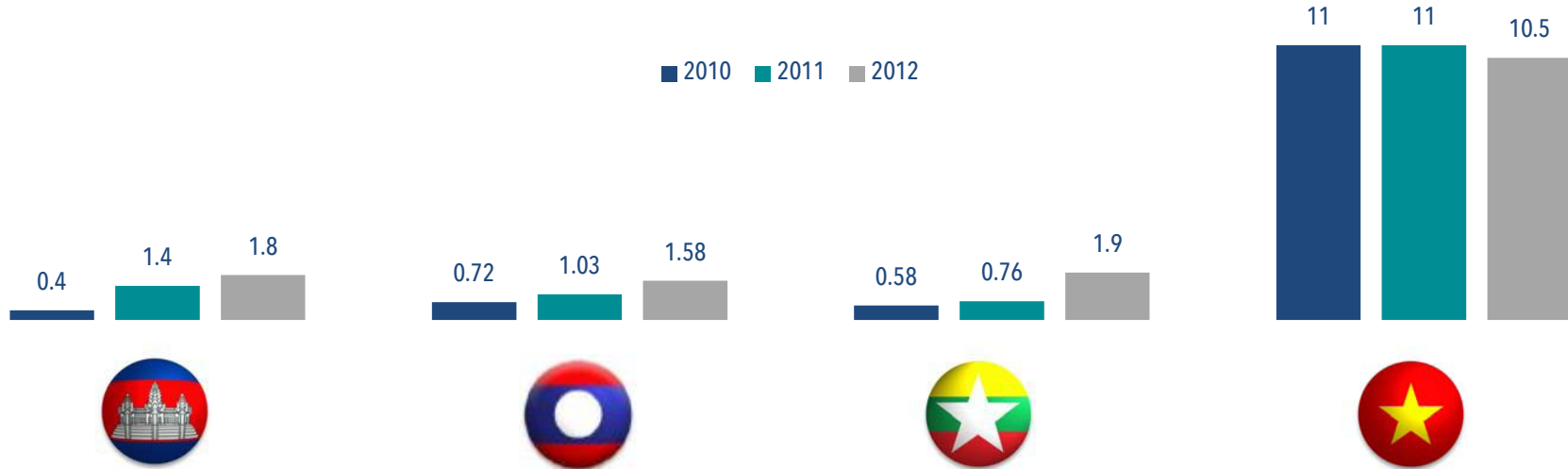


## Becoming Easier for the International Business



- Positive signals in the region as shown by improvement in rankings for "Trading Across Borders" - World Bank *Doing Business 2013* report
- Cambodia and Laos soar in the ranking when you compare from 2010 to 2103

## Total FDI Disbursement (USD Billions)



- Cambodia's market economy, abundant natural resources, rising tourism industry, cost-effective labour pool and political stability are helping it to attract foreign investment. Moreover, the government also set out favorable policies to direct foreign investors' attention to the country by offering very generous investment incentives to investors
- Lao PDR has also experienced an upwards trend in FDI disbursement in the recent years. Its recent WTO membership should help to make it a more viable destination for foreign investment.
- Myanmar is a new, emerging economy with a large population and significant natural resources. Myanmar is undergoing political and economic reforms, which will attract major foreign trade and FDI once the laws are in place.
- Vietnam's large pool of skilled and inexpensive workers remains a key factor for attracting foreign investors. The total FDI disbursement has followed a steady upward trend during the period of 2010 - 2012 as Vietnam has been one of the fastest-growing economies in Asia in recent years,



# Where are the Opportunities?

## KEY GROWTH INDUSTRIES





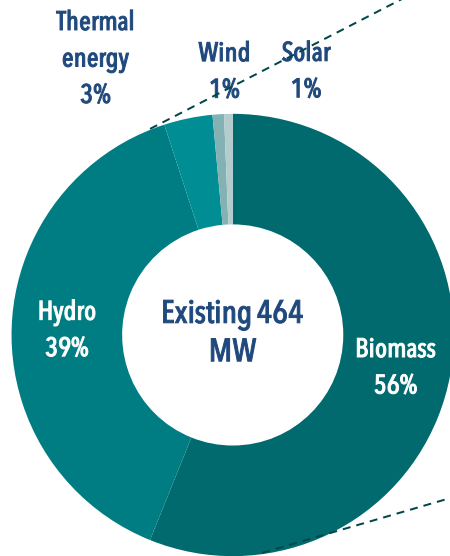
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# Renewable Energy

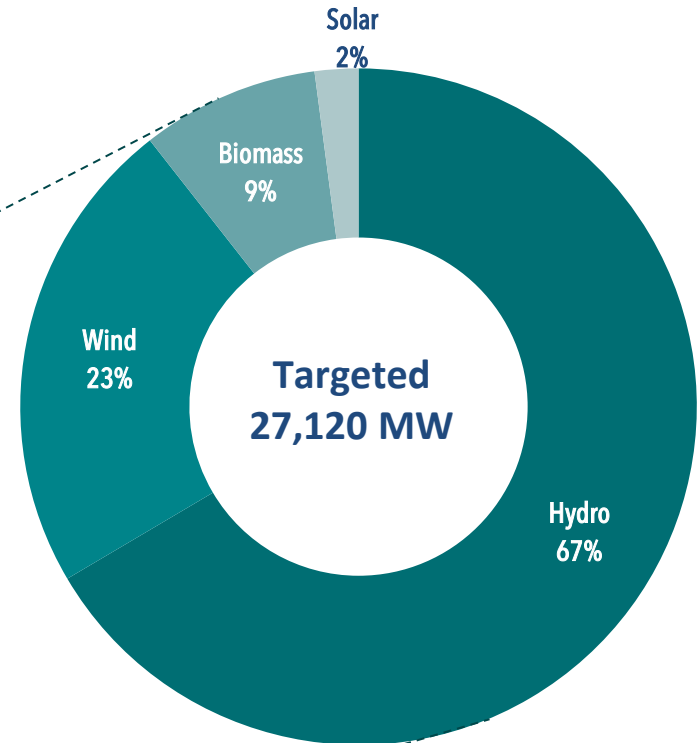


# Renewable Energy in CLMV

- Hydro energy will become the main source of renewable energy in CLMV region within 2030 timeframe.
- Laos is targeting to become the "Battery of Southeast Asia"
- Wind energy is becoming more common in usage due to high investment in Vietnam with support from government



CAGR - 50%  
the next 20 years

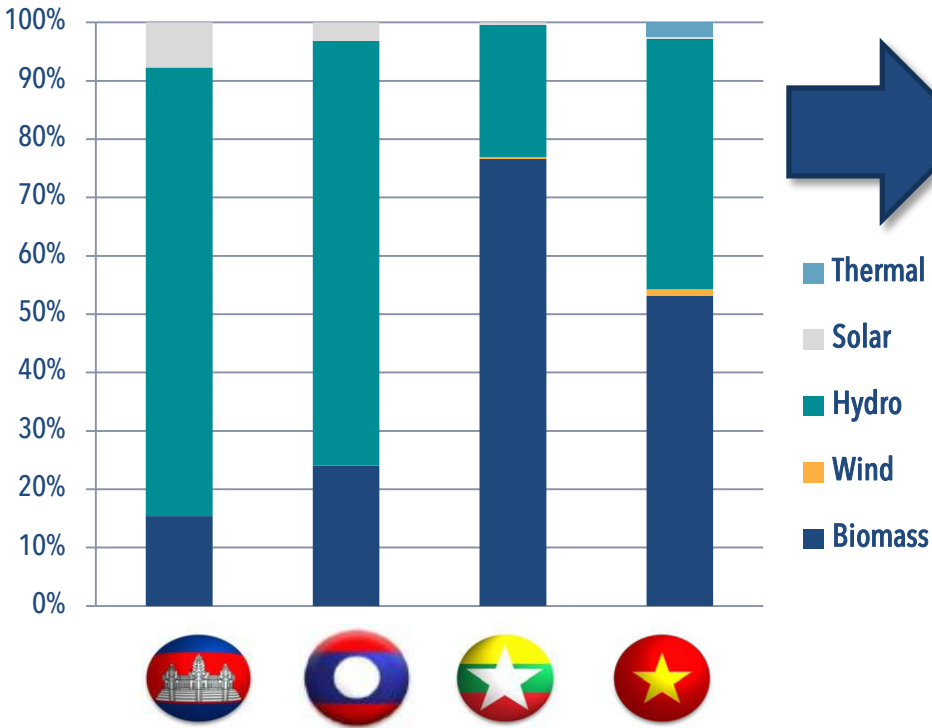


Year 2030



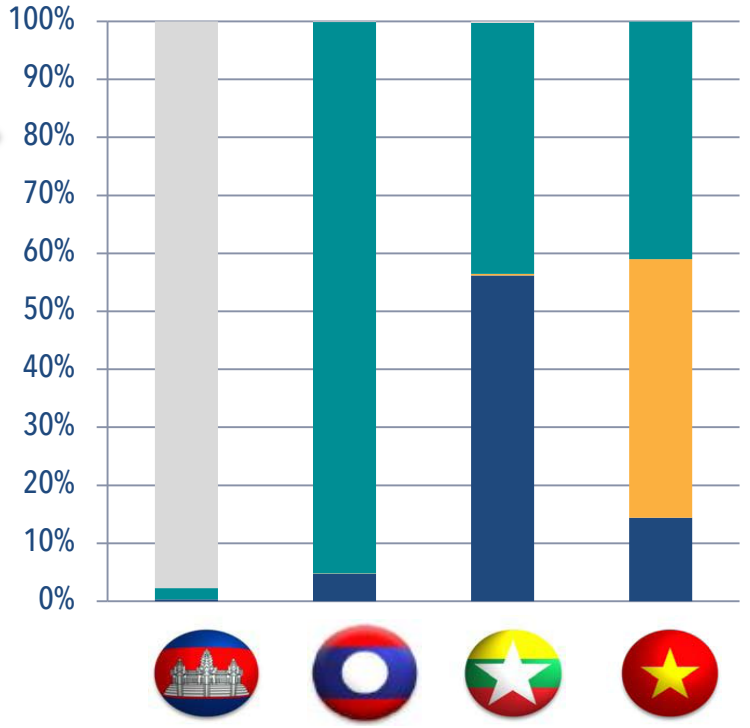
# Future of Renewable Energy in CLMV

Year 2010



- Vietnam has the highest of MW capacity and technology adoption of the four countries.
- Biomass is widely use in CLMV countries because of the low cost and the ability to use the waste from agriculture products

Year 2025-30



- Hydro power will be a main source of energy provide in Southeast Asia generated by Laos and Myanmar.
- Cambodia will focus on Solar energy and will provide 70% of rural with electricity by using solar energy.

CLMV - Where is the final frontier?



# Support and Future Plan for Renewable Energy in CLMV



- Government provide public investment loans or financing for renewable investment
- Provides incentives for renewable energy usage: mini hydro and solar energy
- 2020 Master plan, all villages will have access to electricity of different forms; and the year 2030 70% of all rural Households will have access grid quality electricity



- Governments launched Renewable Energy Development Strategy focuses on bio fuels, bio gas, and hydro power that not yet explored
- Government has plan to use hydro power to eradicate poverty and supply to neighborhood countries e.g Vietnam and Thailand
- Aims to increase share of renewable energies to 30% of the total energy consumption by 2025



- To maintain the status of energy independence
- To promote wider use of new and renewable sources of energy
- To promote energy efficiency and conservation
- To promote use of alternatives fuels in household



- Financial Incentives on tax incentives and Capital subsidy, grant, or rebate.
- Provide tradable renewable energy certificate ( REC)
- Generate 5% of its energy supply from renewable by 2020 and 11% by 2050

















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**Automotive**















# Motorcycle in CLMV

Market size (2012)		Growth (2012)	Top Brand	Trend and Opportunities
	233 K Units	7%	 <b>HONDA</b>  <b>YAMAHA</b>	<ul style="list-style-type: none"> <li>Personal relationship and local partner are the key to successful for business in Cambodia</li> <li>Most of motorcycle import are Japanese brands with production plants in Thailand, China and Vietnam</li> </ul>
	111 K Units	13%	 <b>HONDA</b>  <b>YAMAHA</b>	<ul style="list-style-type: none"> <li>Most of the motorcycle import from Japan and China</li> <li>Kolao is the main domestic motorcycle manufacturing in Laos</li> </ul>
	1.2 Mil Units	63%	 <b>HONDA</b>  <b>YAMAHA</b>	<ul style="list-style-type: none"> <li>Mandalay has become the front line in the motorcycle market share since a ban on riding in Yangon</li> <li>Chinese-made bikes such as Kenbo, LuoJia, Zongshen are gaining more popularity in Myanmar due to price factor</li> </ul>
	1.3 Mil Units	4%	 <b>HONDA</b>  <b>SUZUKI</b>	<ul style="list-style-type: none"> <li>Honda is very strong brand in Vietnam with 64% shear in Local market with there own plant specialize in produce motorcycle part</li> </ul>



# Passenger Car in CLMV

Market size (2012)		Growth (2012)	Top Brand	Trend and Opportunities
	21 K Units	6%	 <b>TOYOTA</b>  <b>HONDA</b>	<ul style="list-style-type: none"> <li>The majority of cars are imported second-hand Japanese vehicles.</li> <li>Mostly customer choose Toyota because of parts are available and affordable</li> </ul>
	8 K Units	34%	 <b>HYUNDAI</b>  <b>KIA</b>	<ul style="list-style-type: none"> <li>The second hand car not allowed to import</li> <li>Hyundai is the most successful brand in the market due to the first move advantage on promotion and financial loan for vehicle</li> </ul>
	38 K Units	14%	 <b>TOYOTA</b>  <b>HONDA</b>	<ul style="list-style-type: none"> <li>Most of Myanmar people like Japanese car.</li> <li>Toyota is the most popular brand in the country due to the first Japanese import car and people believe that Toyota machine is stronger than the other.</li> </ul>
	60 K Units	-40%	 <b>TOYOTA</b>  <b>KIA</b>	<ul style="list-style-type: none"> <li>Tax regulation became a very strong barrier for buying new cars that why Toyota who have their own assembly is the most successful.</li> <li>In 2012, the market was impacted by the bad debt crisis which affected the loan approval for auto.</li> </ul>

CLMV - Where is the final frontier?

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Source: National Statistic from each country Note: Growth rate calculated based on increased of registered vehicles in 2012

# Investment Scheme in Automotive Industry

	Current plant	On going plant	Incentive Tax	Free Trade Area (FTA)
	 		<ul style="list-style-type: none"> <li>Vat exemption policy for the investor who invest in special economic zone with no specific time limit</li> </ul>	<ul style="list-style-type: none"> <li>No Free trade area</li> </ul>
			<ul style="list-style-type: none"> <li>Have policy for the investor such as special economic zone which reduce tax for 10 years and reduce to 5-10% from 40% import tax</li> </ul>	<ul style="list-style-type: none"> <li>The other countries beside FTA countries will have to apply MFN (General Most-Favoured-Nation) scheme for any export goods to Lao PDR.</li> </ul>
	 		<ul style="list-style-type: none"> <li>The Government Incentive, they have no spare part tax to promote the assembly in Myanmar</li> </ul>	<ul style="list-style-type: none"> <li>No Free trade area</li> </ul>
	    		<ul style="list-style-type: none"> <li>Complete knock down vehicles can enjoy a lower taxation rate</li> <li>Government incentive for investor in Special economic zone such as incentive tax rate for 15 year and Incentives in tax exemption and reduction tax 50 percent for a maximum four years</li> </ul>	<ul style="list-style-type: none"> <li>ASEAN, all of the Complete Built-in vehicles made and imported from any ASEAN country will be taxed at 0% in 2018</li> <li>WTO, its Complete Built-in vehicles import tax is expected to be 70% in 2014 and 47% in 2017</li> </ul>

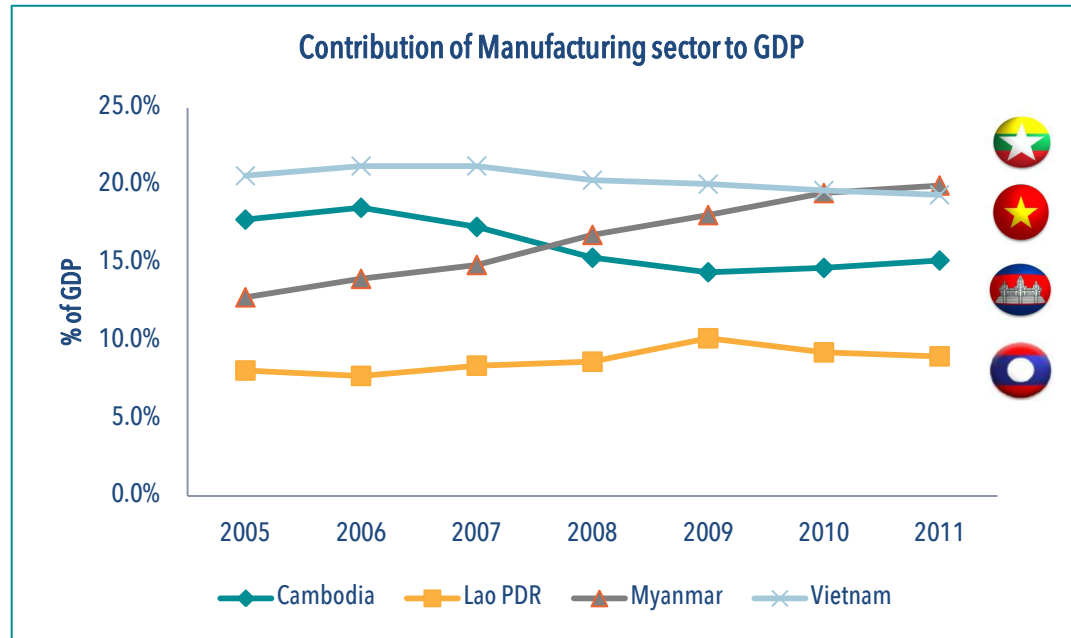


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# Manufacturing



# Importance of Manufacturing in CLMV

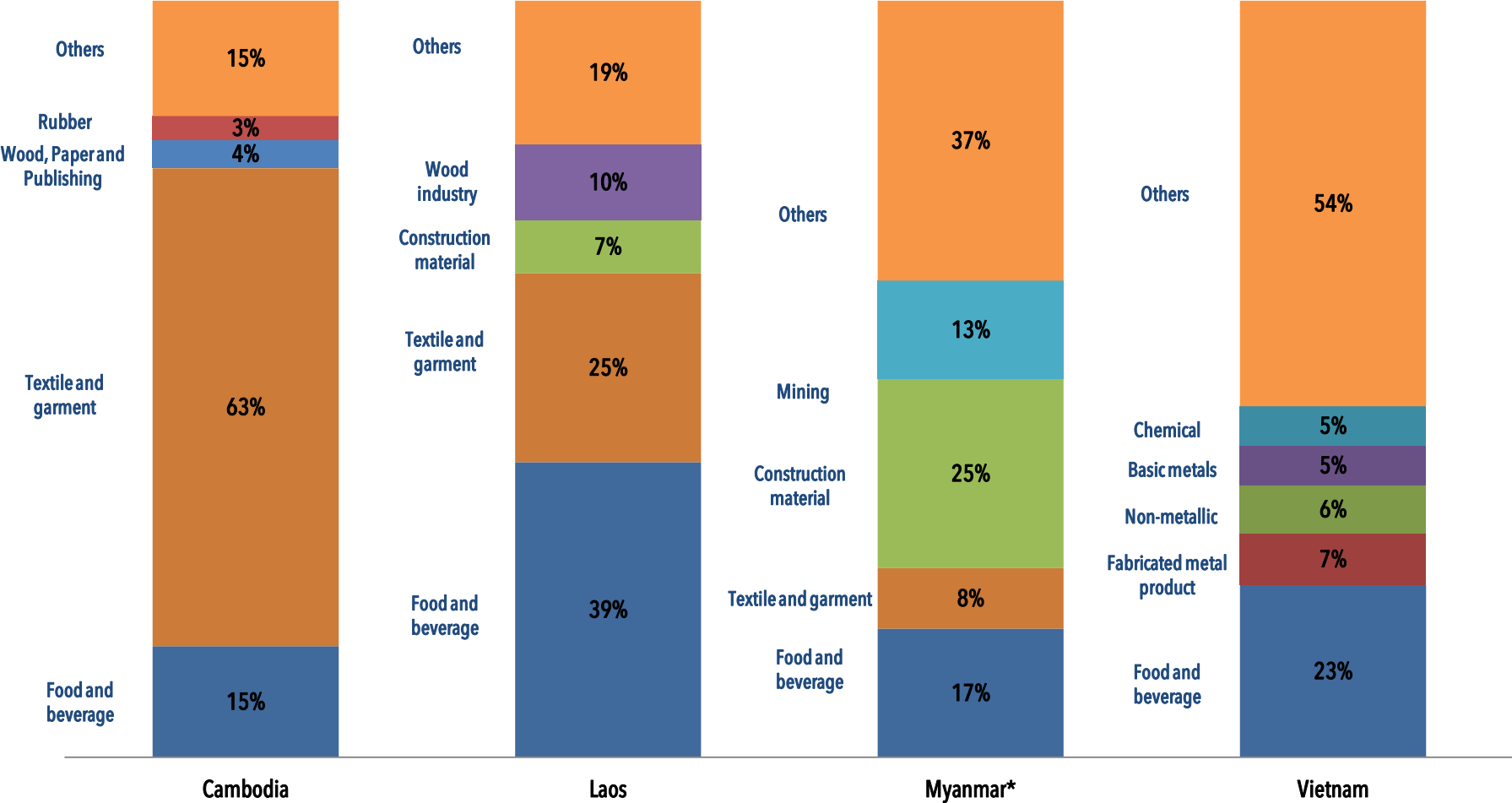


## Key insight

- Vietnam is the leading country in the total output value of the manufacturing sector which reached USD 23.6 billions in 2011. It also has the highest number of manufacturers compared to other three markets.
- Subsequently, the manufacturing sector in Vietnam accounts for nearly 20% of GDP in 2011 consistently throughout the years. Meanwhile, Myanmar has also experienced a steady growth in total output value of the manufacturing sector and significantly increasing its share in the total GDP. Due to the recent economic reforms in 2011, Myanmar's domestic industries are modernizing and industrializing.
- In contrast, the manufacturing sector in Cambodia and Laos is not growing strong due to the fact that industry sector still lag behind agriculture and services.



# Key Subsectors of Manufacturing



CLMV - Where is the final frontier?  
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*Note: No official breakdown for Myanmar. The breakdown of Myanmar estimated from various sources*





# Government Incentives and Support



- **Open door policy:** (1) 100% foreign equity ownership investments are allowed except for the ownership of land (2) Free remittance of foreign currencies abroad
- **Investment incentives:** (1) 20% Corporate Tax (2) Full import duty exemption



- **Good policies framework:** Unilateral trade agreement with 39 countries and setting up industrial park projects and calling investments for manufacturing sectors
- **Investment incentives:** (1) Exemption from import duties and taxes on raw materials and capital equipment using for production (2) Tax holiday offered and Corporate income tax exemption up to 10 years (3) Reduced tax rate for large projects with special concession are available upon negotiation



- **Land used** Investor has a right of the grantee of land leases or land used from government owned land, governmental department, organization owned lands and citizen owned private lands
- **Investment incentives:** (1) A 5-year tax holiday (2) Up to 50% income tax relief on profits gained from exported goods (3) Exemption from customs duty on machinery (4) Exemption from customs duty on raw material (5) Exemption from commercial tax on imported goods



- Encouraging investments on production of new materials and new energy; manufacturing of products of high-technology, bio-technology, information-technology and mechanical production.
- **Investment incentives:** (1) Corporate Income Tax exemption and reduction from the first profit making year (2) A preferential Corporate Income Tax of 10% and 20% (3) Import duty exemption on the importation of equipment, materials for implementation of investment projects in Vietnam





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# Residential Construction



# Residential Construction- Growth Catalyst



## Cambodia

- **Economic growth with strong investment from China and urbanization drives** the demand of residential construction in the key cities
- The Cambodian government wants to develop the **tourism sector with a target of 6 million tourists by 2020** which will improve overall peoples income and eventually drive the demand of residential construction.



## Laos

- Increasing of residential construction in satellite towns as the impact of **rail link development in North-South (with China) and East-West** (linking Laos, Thailand and Vietnam)
- **New residential construction in the major cities** such as Vientiane, Pakse, Savannaket and Luang Prabang are expecting to growth at 20% per year

## Myanmar

- As the Myanmar economy opens up, **an influx of people are moving to the cities** requiring more residential construction.
- Yangon, Myanmar's largest city is on track to become a **"mega city"** (population in excess of 10 million) by 2040
- Numerous affordable housing projects are part of the Greater Yangon Strategic Development Plan

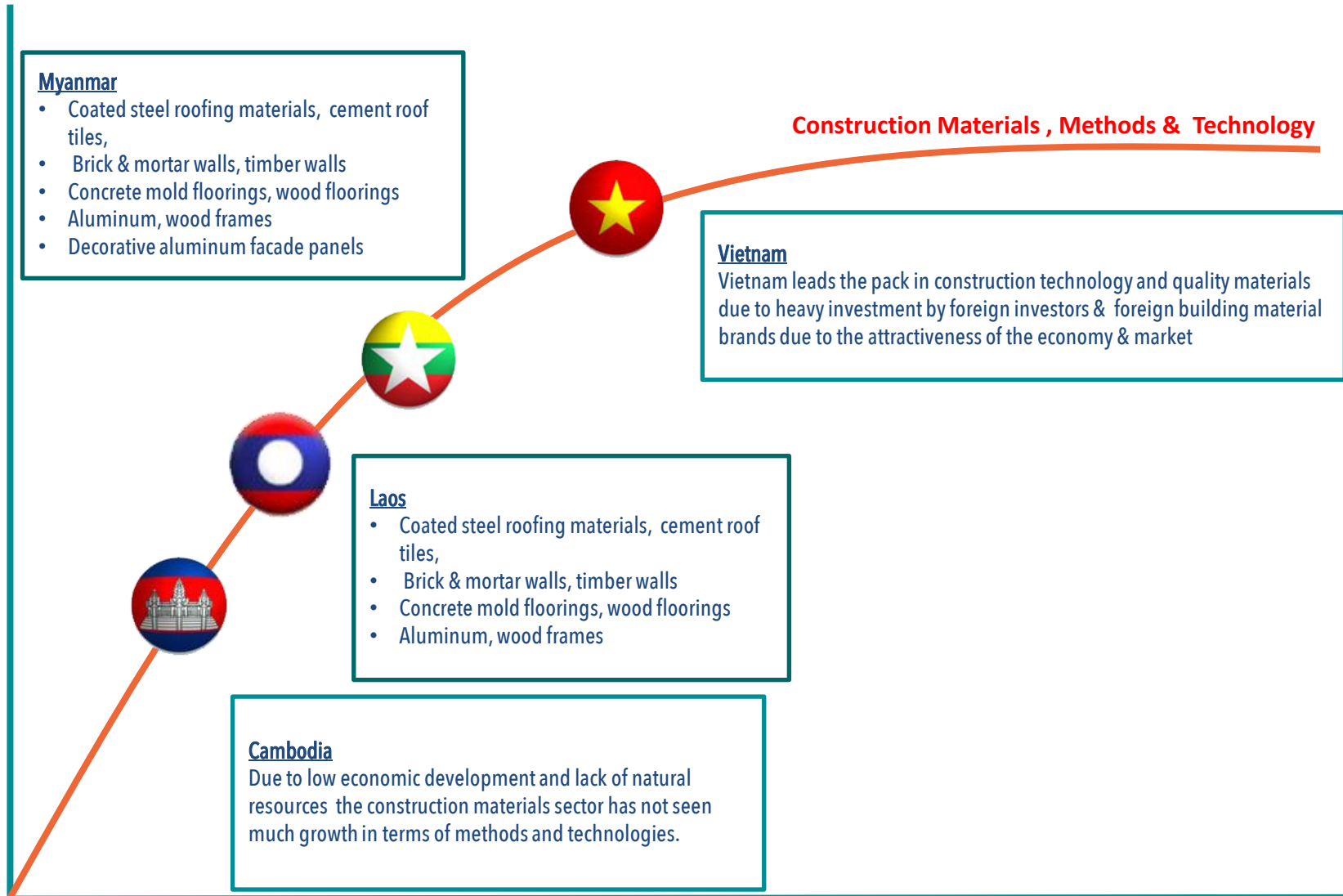


## Vietnam









- In the key economic cities, the demand for residential real estate is increasing due to people **having more discretionary income.**
- Vietnam has a large labor force at relatively low costs making it an attractive destination for FDI. As more people move from the rural areas move to the cities to work in factories, more residential construction will be needed



# CLMV Development of Construction Practice



# Residential Construction Practices and Trends

Area of Residential Construction(M <sup>2</sup> )	Current Practice	Trend and Opportunities
 	<ul style="list-style-type: none"> <li>Labor intensive construction methods. In urban areas mostly brick and cement but in the rural areas temporary materials such as thatch, bamboo &amp; leaves are used.</li> </ul>	<ul style="list-style-type: none"> <li>No major changes in trend is expected for the next few years. As the economy grows more urban residential construction is expected especially in Phnom Penh.</li> </ul>
 	<ul style="list-style-type: none"> <li>Brick, cement and steel materials popular. A lot of the practices influenced by Thailand due to heavy Thai investment in the construction materials sector.</li> </ul>	<ul style="list-style-type: none"> <li>As the cities expand, apartment style commercial buildings (multi-storey townhouses) become more popular. <b><u>Building methods not expected to shift for the next few years.</u></b></li> </ul>
 	<ul style="list-style-type: none"> <li>Mostly still labor intensive construction methods using brick &amp; cement. Now steel frames structures becoming normal use.</li> </ul>	<ul style="list-style-type: none"> <li><b><u>Pre-cast concrete is expected to be one of the next upcoming trends</u></b></li> <li>Future buildings will have to follow the <b><u>new Myanmar building code</u></b> which emphasizes on protection against cyclones and minor earthquakes</li> </ul>
 	<ul style="list-style-type: none"> <li>Heavily rely on brick and cement for residential retail construction while for residential projects pre fabricated concrete are preferred</li> </ul>	<ul style="list-style-type: none"> <li>As people have higher incomes ,high <b><u>end residential apartments &amp; condominiums</u></b> with quality furnishings are expected to be huge growth sector.</li> <li>Higher usage of <b><u>modern construction practices</u></b> such as PEB ( Pre engineer building) or non baked bricks made from industrial waste</li> </ul>





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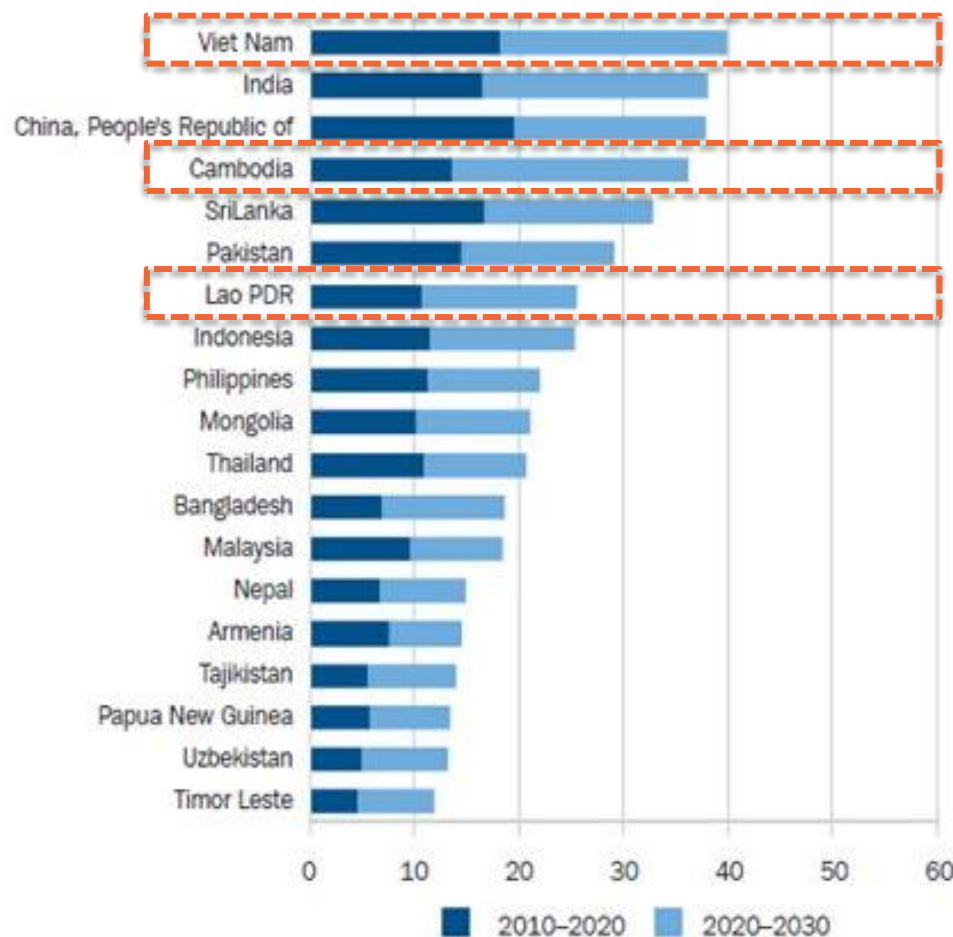
# Consumer Goods



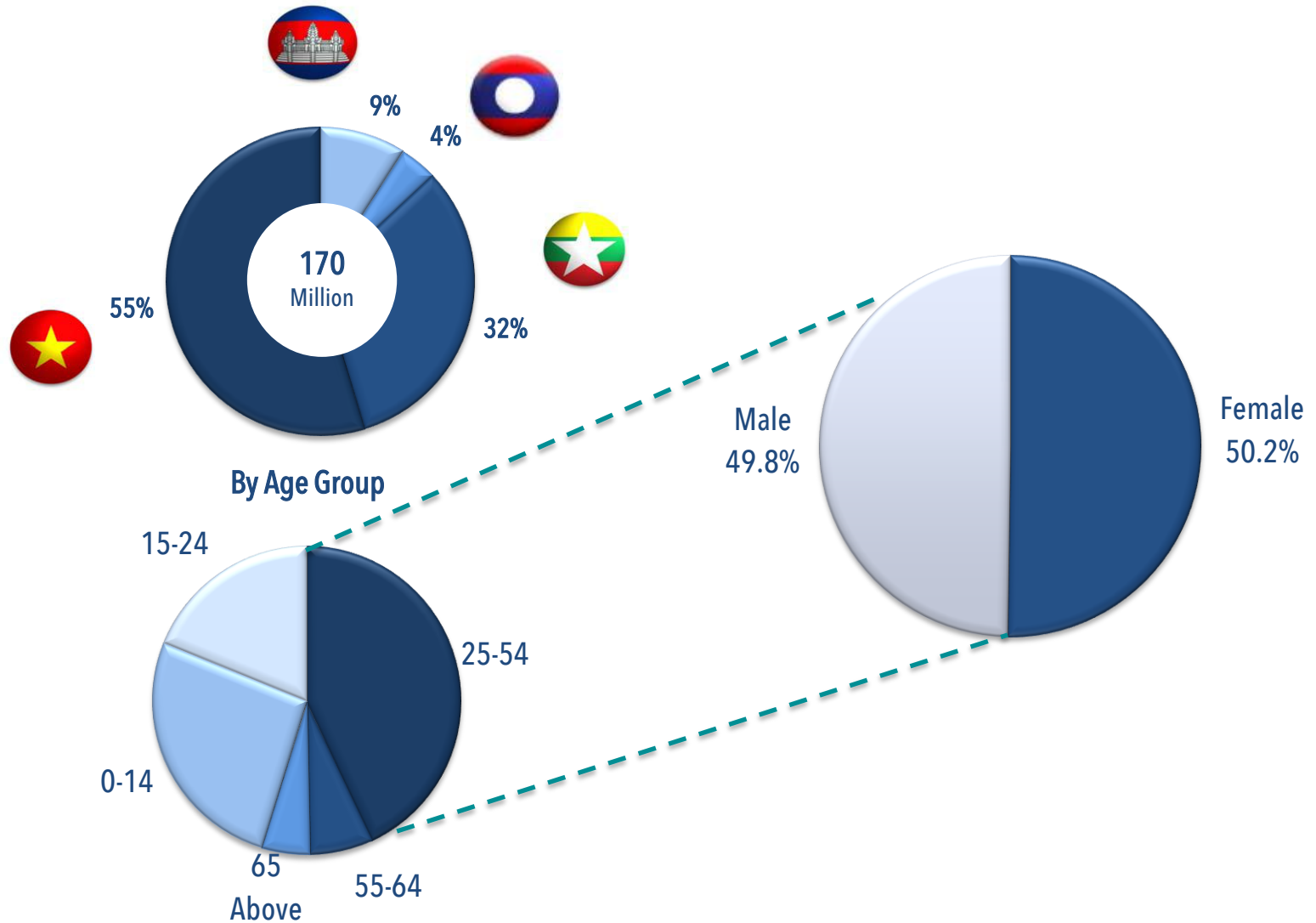
# Emerging of Middle Class Income in CLMV

- Asian Development Bank indicated that Vietnam, Cambodia and Laos are likely to see a significant growth in the *middle class* population in 2030.
- Vietnam is at the top of the growth table with 40% increase of middle class income earners within 2030, whilst Cambodia and Laos are forecast to have more than 25% increase in middle class income earners.

% Change of Population Earning More than 4 USD/person/day

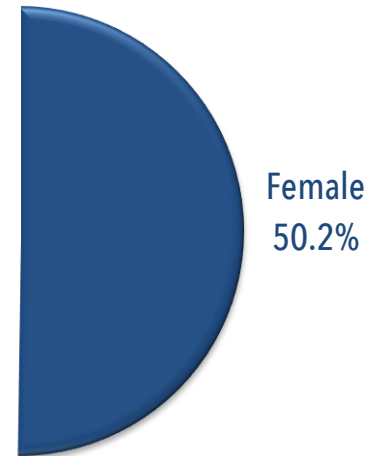


# Who are those in Emerging Middle Class?





**We need to understand them**



# The Final Frontiers?

Modern Women in Cambodia, Laos, Myanmar &  
Vietnam

...and why focus on  
understanding  
**women** in CLMV?

**Why not**





# APAC statistics show...

- ...women in AP will **outnumber** men by 2015
- ...women's advancement is on the **rise**
  - Higher education
  - Better integration in the workforce
  - More have managerial positions
  - More have above median income

**...and the implications?**


**Means...**

**...more individual and family  
spending power**

**...increasingly in  
command of a higher  
*discretionary* spend**

**...annual growth of  
1.7% in disposal  
income**





**Typically the catalyst for female empowerment is an economic necessity which leads to the introduction of women into the workforce—and eventually, their integration.**



**But not all women in CLMV are one and the same, as influenced by...**

**C**ulture

**R**eligion

**E**conomy

**T**radition



Vietnam



Myanmar



Laos



Cambodia

**4 markets with great  
development potential.  
Yet the longest  
development path.**

**And....**

**Significant<sup>43</sup>  
opportunities for  
inter country  
trade**





# Similarities across countries

**liberal**

Countries whose tensions have evolved beyond the Empowerment - Liberation tension

Malay Malaysians move down to a more traditional zone

**limited**

**empowered**

**conformist**

Countries whose tensions still revolve around expectations of society (Empowerment - Liberation Tension)



**Key differences**

**liberal**



Seeking Perfection

Balance and diversity

Living life to the fullest

Moral pressure

Philippines



Perpetual self-appraisal

Maximizing choices

Japan



Pragmatic progress



China

Conforming in a segment society



Malaysia



Myanmar

Progressing but assuaging guilt

Laos

Subdued power and progress



India

Identity within traditional bounds

**limited**

Cannot be the odd one out

Indonesia



Cambodia



**empowered**

**conformist**



A field of white flowers with a single red flower standing out. The red flower is positioned in the upper left quadrant of the image. The text is centered in the lower half of the image.

**Let's consider who these women  
are in CLMV?**



# Cambodia



A white dove is shown in flight, positioned in the lower-left quadrant of the frame. The bird is captured in a dynamic pose, with its wings spread and its tail feathers visible. The background is a soft, light-colored gradient, possibly representing a sky or a plain. The overall image has a slightly blurred, ethereal quality.

**Life has been tough for the Cambodian people; they are still recovering from decades of upheaval that still has direct impact to their present lives**

# **ECONOMIC & CONTEMPORARY SOCIETAL PROGRESS HAS BEEN A SLOW AND A HARD JOURNEY; CAMBODIANS ARE STILL IN THE MIDST OF RECOVERY AS A NATION**

**PEOPLE'S SKILLS ARE NOT COPING WITH PROGRESS IN ASIA; NOT ABLE TO COMPETE IN ASIA**

- Genocide of intellectuals during Khmer Rouge regime – essentially leaving the people intellectually unequipped to cope with progress
- Typical jobs are low skill paid job such as factory worker – pushed to take these kind of jobs for survival

**GOVERNMENT HAS ONLY RECENTLY BECOME POLITICALLY STABLE; PRIORITIZING ECONOMIC SUPPORT**

- The whole country has just placed the first steps into reconstruction and transformation
- Recognition for economic support to fuel the local economy

# Cambodian women struggle to free themselves from the shackles of a patriarchal society towards its path to modernity; but still hopeful for the future

*'The saying goes that Khmer girls are white cotton while a boy is a gem. When white cotton is muddied, it can never be returned to its original state while a dirtied gem can glitter time and again'.*

*'Despite the fact that schools have opened their doors to girls, and the government has made it a priority to get them in the classroom, a history of prioritizing the education of men has hardly been washed away'*

**Traditional me**  
- I was born to serve

**Transitional me =  
PRESENT**

- Relatively better opportunities vs. 5 years ago but compared to men, still lower chances to succeed
- Women's ideas are less likely to be accepted; traditional role of supporter still dominates in the culture

**Future me**

- Having a strong sense of self identity and an independent life; being recognized as an equal to men
- But even if the future seems to be unreachable now, Cambodian women still look to the future and are hopeful for the realization of this aspiration

A close-up photograph of two hands clasped together in a supportive grip. The hands are positioned diagonally across the frame, with one hand resting on the back of the other. The skin is a warm, natural tone, and the lighting is soft, highlighting the texture of the skin and the strength of the grip. The background is dark, making the hands stand out prominently.

**In order to assist this transition to modernity, the modern woman needs support; both at the society level and her immediate community**

- There is the desire to be recognized but because of the overall lack of support, modern women more than anything have issues on confidence and self esteem
- At this period of transition, modern women are equipping and building self capability and confidence to be able to progress



Therefore, in communicating with Cambodian women, it is about **confidence and enabling the self to take step towards her own progress**

safe place to  
grow

**external  
validation**

**PROGRESS**

**Self improvement**

acceptance

**RECOGNITION**

**confidence**

Laos



# **BUDDHISM HAS STRONG INFLUENCE IN THE LAOS CULTURE; TRUE HAPPINESS IS ACHIEVED WITH A CONFLICT FREE LIFE AND CONTENTMENT**

- Happiness can only be achieved with a pure and peaceful mind
- There is much effort put in conforming to the values of harmony, balance and to a larger extent being content with one's blessings
- Therefore Laotians tend to stick to their own kin and do not attempt to 'change the world'

# TRADE POLICIES OF THE GOVERNMENT ATTRACT FOREIGN INVESTMENT THAT FUEL THE ECONOMY, PROMOTING EQUAL OPPORTUNITIES FOR WOMEN IN THE WORKFORCE

More women are now active in the economy.  
73% of women (compared to 78% for men)  
are part of the labor force

- Laos GDP growth is at 8.2% in 2012
- After the Liberation, special measures such as open trade policies, access to better education and championing gender equality were conducted to utilize the enormous female labor force in revitalizing the economy
- Women's participation in the economy has therefore greatly increased in the past decade
- More white-collar jobs for women e.g. women make up 50% in commerce, 48.8% in public health, 22-25% in public service and 50% in education

# THERE IS OPPORTUNITY FOR PERSONAL PROGRESS AND ACHIEVEMENT, HOWEVER THE **TENSION** OF LAOTIAN WOMEN IS BALANCING THIS AMBITION WITH THE BUDDHIST VALUE OF CONTENTMENT

- There is considerable individuality with Laotian women as they have become more independent economically and spiritually
- Opportunities also present themselves in career options
- However, modern women live with an internal struggle to find the balance between their ambition and the negatives that may come with it (material attachment, pride and arrogance) with the deeply ingrained value of contentment and balance



Therefore in communicating with Laotian women,  
it's about **empowerment within the bounds of  
moderation**

harmony

grounded  
empowerment

balance

independence


boundaries

**CONTENTMENT**

not  
indulgent



Myanmar



The key theme for Myanmar women revolves around ***empowerment***

...as women are now encouraged to work, mainly for economic reasons. But women are still not expected to be the breadwinners in the families

“Women can now work but still as a supporter to the husband—not as a breadwinner.”

“A typical single woman is working in a company—an office staff—and she pursues her hobbies and interests. But a married woman is not considered a 'breadwinner'”

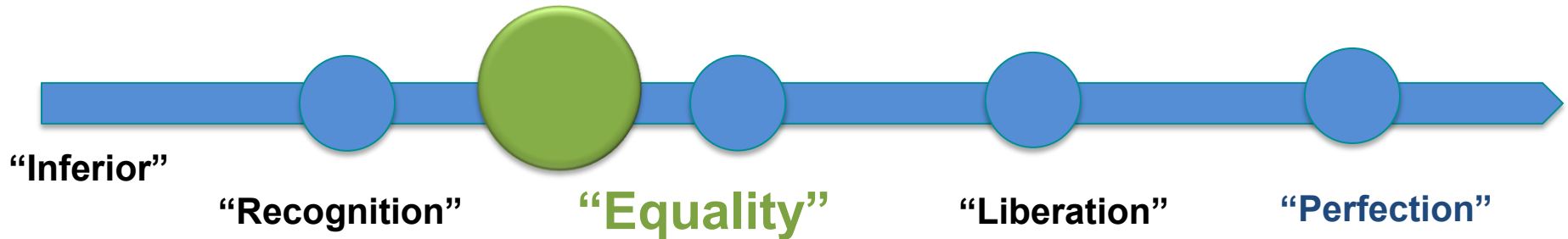




**Women in Myanmar are presented with opportunities as the country is at 'full speed ahead' to development**

Being at the crossroads of development and tradition, women are given the chance to improve their living while still fulfilling the role of being a homemaker—taking care of the husband and kids if married; and the parents if single

# Women have already been recognized in terms of role; now, they seek equality



As Myanmar opens its doors to the world, the demand for labor is high. In the past year, Myanmar is beefing up its manpower in order to cope with the expanding market from manufacturing to service related industries. As a result, women started to be integrated into the workforce. Also, the higher cost of living pushes the women to **augment** the income of the family or the husband

Women, especially the married, are seen as a “support” to the husband and just to augment the income. Married women are still not seen and expected to be a breadwinner. In fact, if they spend more time outside of home—at work—they feel guilty and would think that people around them judge them for not fulfilling their original cosmic role

**The momentum of Myanmar in terms of economic progression seems to halo to the thirst of women to be empowered. The aim for equality is geared towards the opportunities presented to both men and women. But at the end of the day, women are still expected to take be the household manager**

For the single women, there is an increasing trend of women integrated in the corporate and office work. This gives them the power to pursue hobbies and interests. But at the end of the day, they have to be of servitude to their own families at home.

A woman with long hair, wearing a white hoodie, is shown in profile from the waist up, reaching her right arm out towards a bright sun in a cloudy sky. The background shows a landscape with rolling hills and a small rainbow visible near the horizon. The overall mood is one of aspiration and hope.

**Given that they are now recognized as an integral part of the workforce, their innate tension now is achieving equality—without guilt or judgment**

**“A modern women for me is someone who has a business or a top executive or CEO of a company. She is able to grow her own business of grow her own company. She has a successful track record and she is recognized by the society. Of course, I want to be that modern woman.”**

**“Hopefully in the future, we will be able to have more chance to hold higher position without feeling guilty that we are spending more time outside of home. Sometimes, when I go home late at night, I think people around me think I am not a good mom since I spend more time outside of home.”**

Therefore, in communicating to women in Myanmar, it is about **“empowerment”** or **“equal opportunities”** but within the acceptable bounds or should be in the context of others prospering *with* her

**augment**

prospering together

**collective**

**balance**

**DRIVEN BUT NOT SOLELY FOR SELF**

**SUCCESSFUL**

**supported and  
supportive**

**BUT WITH  
AFFIRMATION**





**Vietnam**



## **Vietnamese women are rooted in a strong sense of family values**

- **Generational heritage**
- **Service to family**
- **Respect for elders**

A woman is captured in a moment of joy, running on a sandy beach at sunset. She is seen from behind, with her arms outstretched wide to the sides, embracing the moment. The sun is low on the horizon, creating a warm, golden glow that reflects off the water and sand. The overall mood is one of freedom and happiness.

Therefore the challenge of a Vietnamese modern woman is to be able to find her own identity within the acceptable bounds of tradition

*“I do want to be able to say, ‘This is ME’ – something that goes beyond what is expected of me as a woman”*

**There is guilt when she crosses the line; an internal struggle brought about by a compromise with family traditions**



**“I have this sick feeling in me whenever I am selfish – when I am not able to give my family what is due to them. I feel that I have betrayed them”**





**Ultimately, she will try to fit her *modernity* to her family and will never let her family fit in her *modernity***

“Daily dinners are always home cooked and are cooked by the wife / mothers. Even if I have a full time job, I make sure that I go home early enough to cook dinner. This is a non negotiable to me. This is what we have done when I was small and I want my children to have this as well”

Therefore, in communicating with Vietnamese women, it is still about “**empowerment**” or “**opportunities**”

...within the boundaries of family tradition

**affirmation**

family validation

**knowing**

**support**

**your limits**

**SELF DISCOVERY**

**security**

Brands that tap into  
resonating insight build  
**emotional affinity** and **loyalty**

**Context is Key**



# A source of insight



*A discovery about your consumer that opens the door to an opportunity for your brand.*



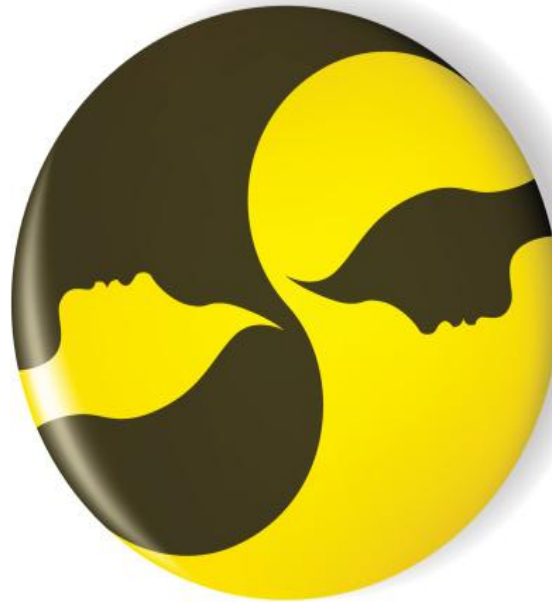
*An insight also defines an **unmet** consumer need*

**Implication: Implementing a superior, differentiated insight will translate to competitive superiority and will lead to competitive advantage**

# The 2 Faces of Contemporary Woman

Should be

Being seen to subscribe to societal and cultural expectations and norms



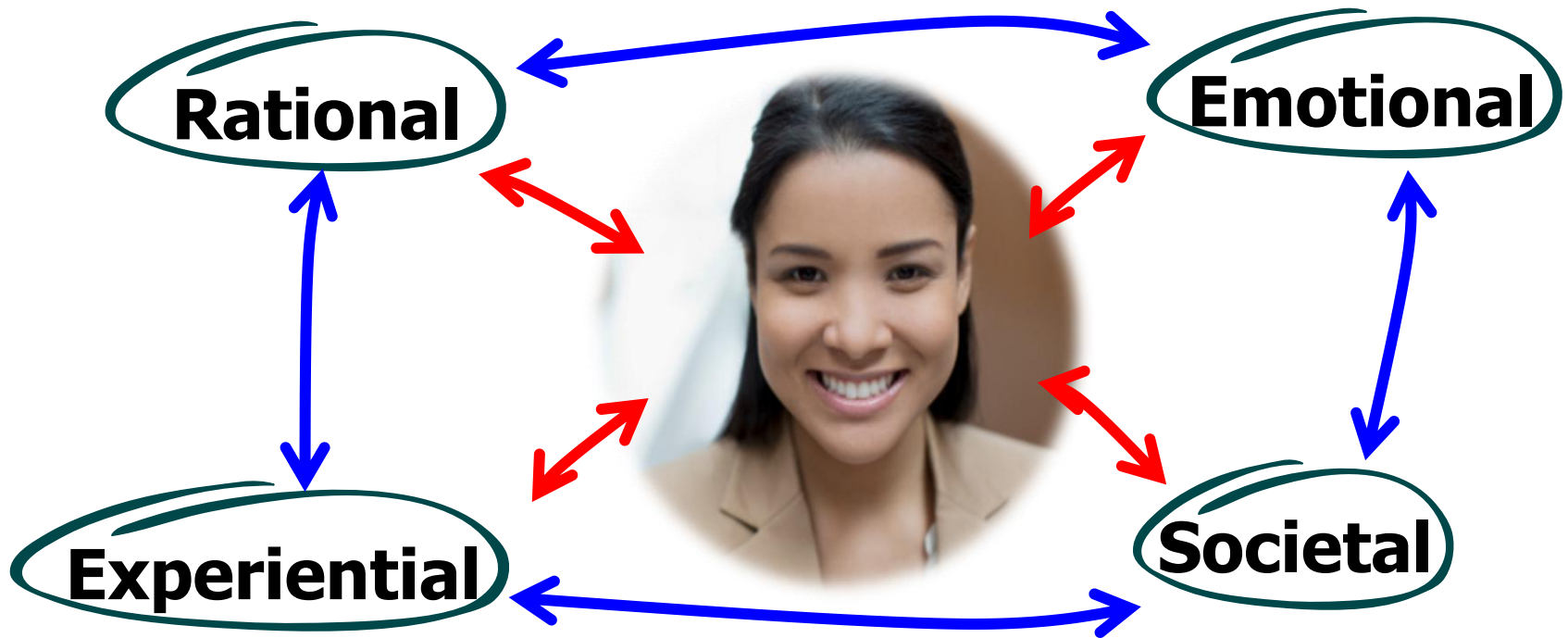
Could be

Modifying behaviors to fit *my* lifestyle and *my* needs

Tensions & Contradictions

Tensions & Contradictions provide opportunities for brands...

# Frameworks Are A Start Point in **Simplifying Complexity**



Making sense of a potentially complex consumer

# Real Competitive Advantage

- From a marketing perspective *understanding* contemporary notions and expressions of contemporary woman provides significant opportunities to:
  - Position brands as relevant and *'knowing'* (they understand me and my needs)
  - Demonstrate a greater depth of sensitivity and consumer connection
  - Deliver more relevant, motivating and ultimately more meaningful product expressions
  - Differentiate you from your competitors



**Delivering Real Competitive Advantage**



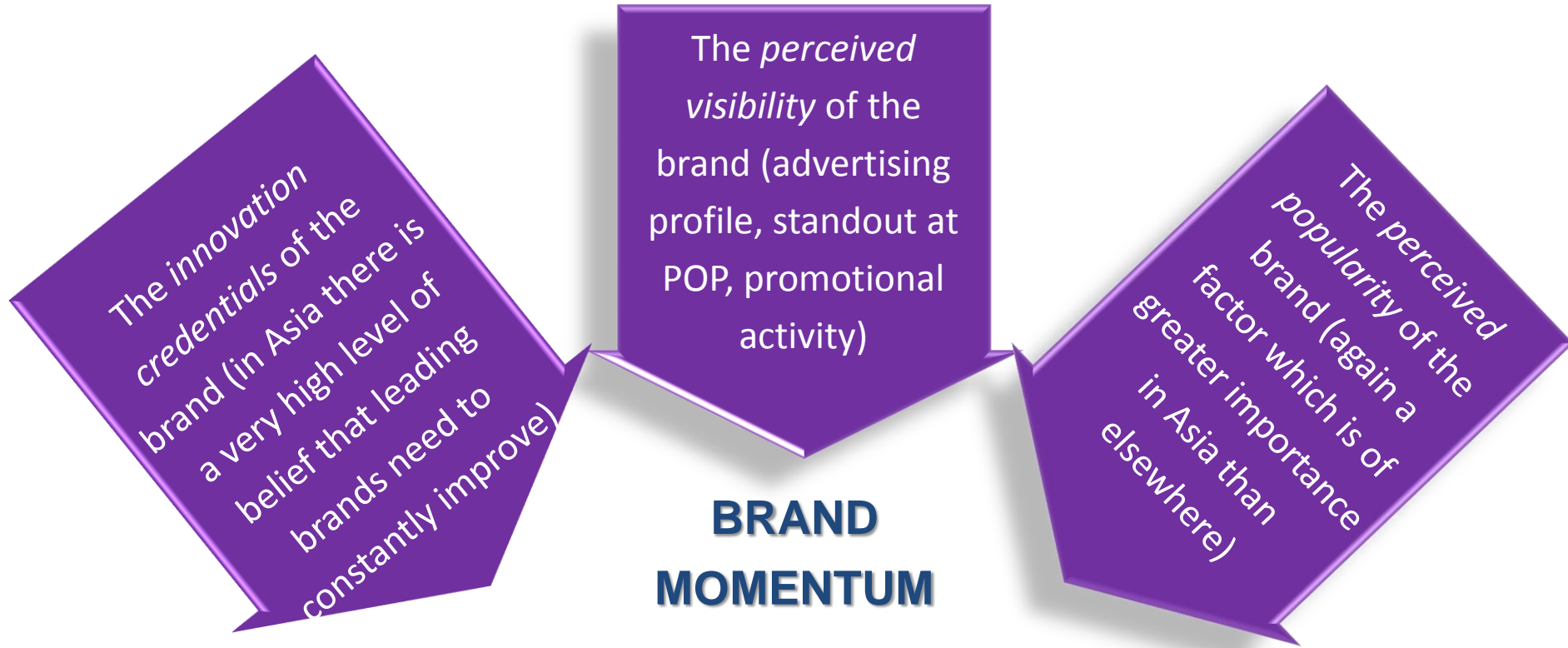
## The Evolution of Mundane?

- Washing machine ownership....quest for delegation
- Freedom, time, 'me'
- Yet, hand wash prevails...for some elements
  - 'Should Be'
- The 'Captain of the ship'
  - She doesn't want to be left behind
  - Equality with her peers, family, partners
- Depiction of modern women in TVC's
- Activation versus information

**Suitably equipped to  
handle progress**



# Brand Momentum



# People Engagement



## People Engagement

### Context is Key

- Facial coding
- SMX
  - Mobile
  - Blogs
  - Communities
- Immersive methodologies

# Questions?

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